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GAIN Report

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Spain

Citrus

Semi-Annual

2002

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Report Highlights:

Spain's 2001/02 citrus production is estimated at 5,539,350 metric tons, slightly higher than the previous campaign. Citrus exports during the 2000/01 campaign decreased due to a shorter crop.

Includes PSD changes: Yes

Includes Trade Matrix: No

Semi-Annual Report

Madrid [SP1], SP

Executive Summary

Official data estimates Spain's 2001/2002 orange crop 2,806,900 metric tons, higher than the previous estimate and about four percent higher than last season's output. According to the latest official estimates, 2001/2002 tangerine production is expected to be 1,655,100 metric tons, about seven percent below last year's crop, which was also lower than the previous year's crop. The latest official estimates peg the 2001/2002 Spanish lemon crop at 1,036,700 metric tons, about 14 percent higher than last year. The 2001/2002 total citrus crop is estimated at 5.5 million tons, about one percent higher than the previous year's crop.

Total production of the main citrus crops for marketing year 2001/2002, by region, is as follows:

Spanish Citrus Production - 2001/2002
Metric Tons

Region	Sweet Oranges	Tangerines	Bitter Oranges	Lemons	Grapefruits	TOTAL
Valencia	1,696,420	1,408,400	0	360,000	4,155	3,468,755
Murcia	159,800	53,700	0	483,000	13,400	709,900
Andalucia	848,400	135,100	15,000	182,200	8,000	1,188,700
Catalonia	60,000	55,300	0	1,200	17	116,517
Balearic Is.	18,500	2,000	0	2,000	0	22,500
Others	24,000	600	0	8,300	80	32,980
TOTAL	2,806,900	1,655,100	15,000	1,036,700	25,652	5,539,352

Spanish Citrus Production - 2000/2001
Metric Tons

	Sweet Oranges	Tangerines	Bitter Oranges	Lemons	Grapefruits	TOTAL
TOTAL	2,688,500	1,779,800	14,000	961,100	25,000	5,468,400

Reportedly citrus producers have been very pessimistic with the results of the current campaign, although it was slightly higher than the previous one. High temperatures in May 2001 affected the regular setting of the fruit, while hailstorms during the same month damaged the trees. High temperatures in October contributed to an early ripening. November rains damaged the ripe fruit, and low temperatures in early December followed by rains at the end of December and early January caused more damage to tangerines. The Fino lemon variety has not been affected by the April/May 2002, rains because most of the crop had already been harvested, while in the case of Verna lemons, farmers are afraid that the sizes will be too large to be commercialized. Fino lemon growers are trying to sell as many lemons as possible because the branches are loaded with fruit; most of the production is being sold to the industry.

Recent rains have specially affected the Levant area when the trees were blooming and caused the loss of many flowers. If in the next few weeks the weather improves, more flowers could bloom. The roots of trees in areas where precipitation was very high and drainage was not sufficient could deteriorate or be rotten. The benefit of the latest rains is that the area was cleaned of pests that were just emerging. We estimate that under the present circumstances the 2002/2003 citrus crop, will be around 5 percent below the previous year's crop. We estimate the orange crop at 2,600,000 metric tons and tangerines at 1,600,000 metric tons.

Fruit prices are generally lower than during the previous campaign. The Navel-Late is currently being sold at 5.08-5.86 Euros/arroba (4.96-5.63 Euros/arroba a year ago), and Valencia-Late at 2.78-3.88 Euros/arroba (4.51- 4.81 Euros/arroba). Among tangerines, Fortuna variety was sold at 5.86-6.25 Euros/arroba (7.83 Euros/arroba a year earlier). Primofiori lemons are sold at 0.06/0.12 Euros/Kg, (0.15-0.18 Euros/Kg a year earlier).

Spain's orange exports during marketing year 2000/2001 were 1,068,683 metric tons; tangerine exports were 1,105,811 tons, and lemon exports were 521,636 tons. During the previous year, citrus exports were 1,466,007 tons of oranges, 1,358,065 tons of tangerines and 480,727 tons of lemons.

Orange imports during the same period were 178,988 metric tons, compared to 76,788 during the previous season; tangerine imports were 233,275 tons, and lemon imports were 38,977 tons. Argentina is the main origin.

Note: \$1 = 0.90 Euros

Arroba: 12.8 kilograms

P,S&D Fresh Oranges

PSD Table						
Country	Spain					
Commodity	Fresh Oranges				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		11/1999		11/2000		11/2001
Area Planted	136000	136000	137000	137000	137000	137000
Area Harvested	122000	122000	125000	125000	127000	127000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2828	2828	2688	2688	2700	2807
Imports	77	77	110	180	100	80
TOTAL SUPPLY	2905	2905	2798	2868	2800	2887
Exports	1484	1484	1400	1068	1400	1300
Fresh Dom. Consumption	641	641	700	900	730	800
Processing	780	780	698	900	670	787
TOTAL DISTRIBUTION	2905	2905	2798	2868	2800	2887

P,S&D Fresh Tangerines

PSD Table						
Country	Spain					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		11/1999		11/2000		11/2001
Area Planted	102500	102500	103500	103500	104000	104000
Area Harvested	87500	87500	88000	88000	95000	95000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2070	2070	1779	1780	1600	1655
Imports	2	25	7	39	15	45
TOTAL SUPPLY	2072	2095	1786	1819	1615	1700
Exports	1400	1360	1150	1106	990	1020
Fresh Dom. Consumption	410	450	450	460	440	460
Processing	262	285	186	253	185	220
TOTAL DISTRIBUTION	2072	2095	1786	1819	1615	1700

P,S&D Fresh Lemons

PSD Table						
Country	Spain					
Commodity	Fresh Lemons				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		11/1999		11/2000		11/2001
Area Planted	43900	43900	43500	43500	43000	43000
Area Harvested	43000	43000	42500	42500	41500	41500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	892	892	905	960	950	1037
Imports	27	27	25	39	20	23
TOTAL SUPPLY	919	919	930	999	970	1060
Exports	484	484	520	522	540	550
Fresh Dom. Consumption	230	230	210	230	220	260
Processing	205	205	200	247	210	250
TOTAL DISTRIBUTION	919	919	930	999	970	1060